

**Quick Reference Guide - Version 3.0**

Credit Counseling and Financial Management - The Creditor Counseling Certificate and Financial Management B23 form are docketed by separate events. At the initial filing, the Credit Counseling Certificate is required to be docketed separately from the petition. Filers should not use the Official Form B23 when filing the Credit Counseling Certificate. Before the discharge is entered, the Financial Management Form B23 must be filed.

CREDIT COUNSELING	
Step	Action
1	Click on <b>Bankruptcy &gt; Other</b> .
2	Enter the case number - click <b>Next</b> .
3	Verify case number and debtor name(s) - Click <b>Next</b> .
4	Select <b>Certificate of Credit Counseling</b> - click <b>Next</b> .
5	Click <b>Browse</b> on <b>Select the PDF Document</b> screen to locate and verify the document you wish to attach to this entry. Click Open to attach the correct PDF - click <b>Next</b> .
6	At the <b>Joint Filing with other Attorney(s)</b> screen - click <b>Next</b> .
7	At <b>Select the Party</b> screen select the desired party If the certificates are filed in a joint case, please remember to pick the appropriate party filer - click <b>Next</b> .
8	Verify Docket Text and Modify as Appropriate - continue docketing - The Notice of Electronic Filing screen appears and your transaction is complete.

FINANCIAL MANAGEMENT	
Step	Action
1	Click on <b>Bankruptcy &gt; Other</b> .
2	Enter the case number - click <b>Next</b> .
3	Verify case number and debtor name(s) - Click <b>Next</b> .

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4	Select <b>Financial Management Course</b> - click <b>Next</b> .
5	Click <b>Browse</b> on <b>Select the PDF Document</b> screen to locate and verify the document you wish to attach to this entry. Click Open to attach the correct PDF - click <b>Next</b> .
6	At the <b>Joint Filing with other Attorney(s)</b> screen - click <b>Next</b> .
7	At <b>Select the Party</b> screen select the desired party If the certificates are filed in a joint case, please remember to pick the appropriate party filer - click <b>Next</b> .
8	Verify Docket Text and Modify as Appropriate - continue docketing - The Notice of Electronic Filing screen appears and your transaction is complete.